

## Guidelines for Client Transfer

Transferring agency = where the client originated; Receiving agency = where the client will be going.

- If transferring agency is aware that client will be moving, they will contact the receiving agency to notify them of a potential referral.
- *Note: It is up to the receiving agency's discretion whether a client may be accepted.* The receiving agency may use the "Waitlist prioritization guide" to determine if they are able to accept the referral.
- Both agencies will wait until the client has made contact with the receiving agency before discussing details of the client.
- Once contact is made, the receiving agency will have client sign an ROI to talk about her case with the transferring agency.
- Receiving agency faxes the ROI to the transferring agency.
- Phone call to discuss the case and needs of the client
- Transferring agency starts the "PCAP Transfer Form" and sends to receiving agency
- Receiving agency contacts PCAP Council's Quality Assurance Analyst (QA) to start Penelope transfer process, and includes the supervisor from the transferring agency in the e-mail.
- The QA will confirm with both agencies when the file has been transferred.

## Program Intake Criteria

- Primary Intake Criteria
  - Is pregnant or up to six months post-partum
  - Abused alcohol or other drugs during pregnancy
  - Is not successfully engaged with community service providers
- Secondary Intake Criteria
  - Has delivered a child with a diagnosis of FASD
  - Is still drinking
  - Is in childbearing years

## PCAP Transfer Form

**Steps:**

1. The transferring agency must contact the receiving agency to determine whether the client could be transferred. It is up to the receiving agency's discretion whether a client may be accepted.
2. If the client can be transferred, the transferring agency will complete this form to facilitate the process and send to the receiving agency.
3. Once the client has transferred, the receiving agency will notify the transferring agency and the PCAP Council QA to update Penelope information.

**GENERAL INFORMATION**

Transferring agency and contact:			
Receiving agency and contact:			
Client initials:		Client DOB (mm/dd/yyyy):	
Original PCAP ID (Penelope):		Original date of enrollment (mm/dd/yyyy):	
Has this client transferred programs before?			
At the time of intake, did the client meet intake criteria?	<input type="checkbox"/> Yes, Primary	<input type="checkbox"/> Yes, Secondary	
	<input type="checkbox"/> No	<input type="checkbox"/> Other (specify)	

**PAPERWORK STATUS**

	Document completed?	
	Paper/hardcopy	Penelope
Intake Form		
Pregnancy Outcomes		
00-month biannual		
06-month biannual		
12-month biannual		
18-month biannual		
24-month biannual		
30-month biannual		
36-month biannual		
Extended biannual		
Additional Forms		

**Next biannual due date:** \_\_\_\_\_

**Next biannual to be completed by:** \_\_\_\_ Transferring agency \_\_\_\_ Receiving agency  
*(This decision must be agreed upon by both agencies. It is likely both agencies will need to share information for the next biannual, but one agency should be selected to complete the paperwork.)*

**If any document is in hardcopy but not on Penelope, who will be responsible for the data entry?**

\_\_\_ Transferring agency

\_\_\_ Receiving agency (Forms will be \_\_\_ mailed \_\_\_ faxed)

Additional Comments: